SANDATA ELECTRONIC VISIT VERIFICATION (EVV): CLIENT DATA ENTRY

OBJECTIVES

After completing this lesson, you will be able to:

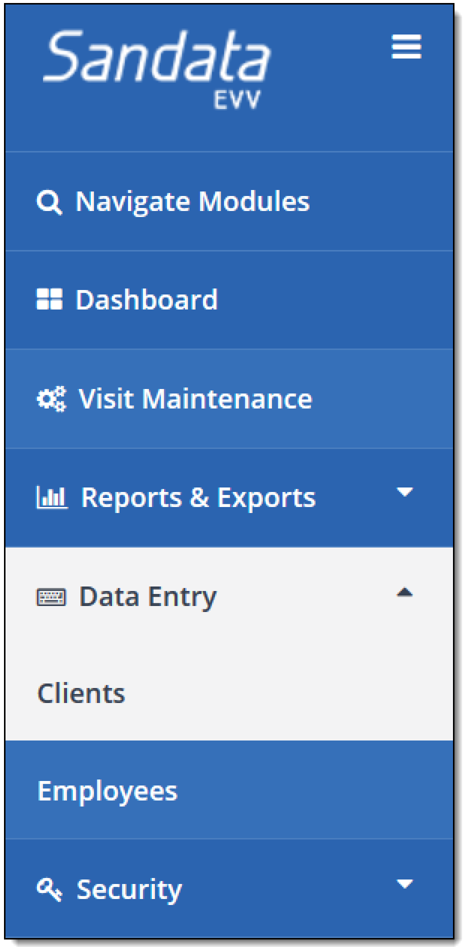
- Search for a client
- Add a client's record
- Update a client's record
- Delete/close a client's record

KEY TERMINOLOGY

Term/Acronym	Definition
Client	A person who receives services through the Medicaid program
Employee	A person who is employed by an agency provider to provide care to one or more clients

ACCESSING DATA ENTRY

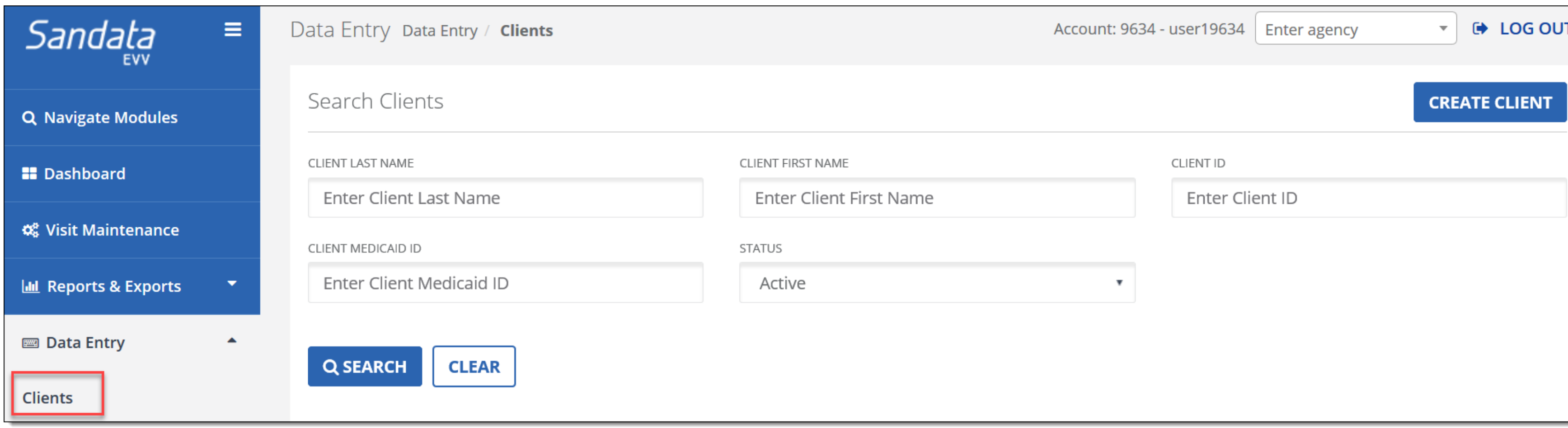
- The Data Entry module allows system users to maintain client and employee records.
- A system user with the appropriate permissions will see the Data Entry link listed in the Navigation panel on the left side of the screen.
- Clicking on the link will expand the section to show Client and Employee options.



SEARCH FOR A CLIENT

SEARCH FOR A CLIENT

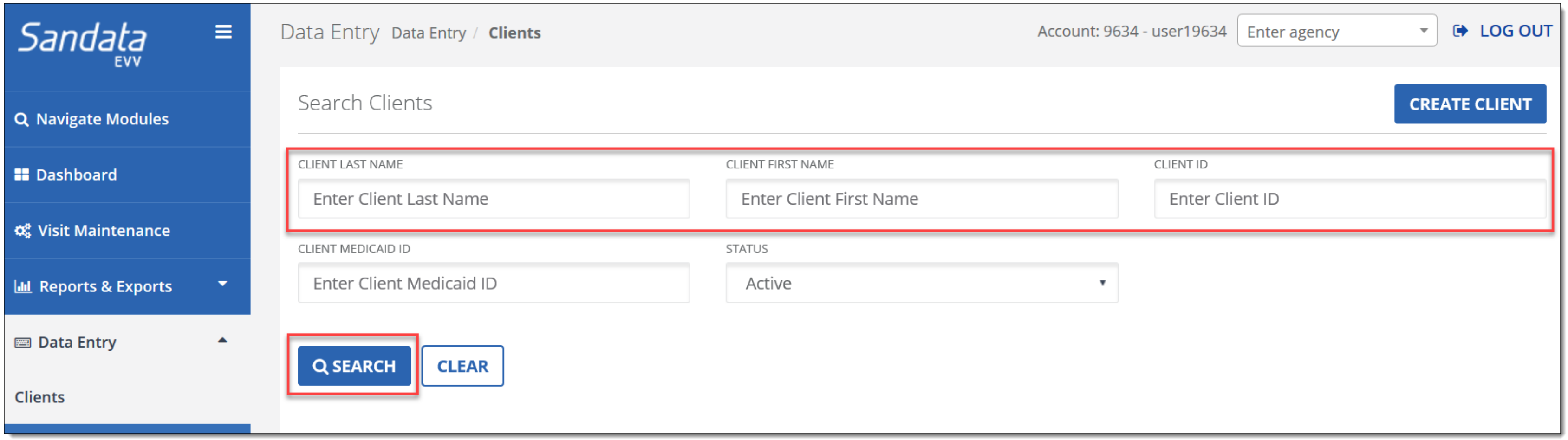
1. Click **Data Entry > Clients** from the Navigation panel. The *Data Entry / Clients* search screen displays.



The system prevents duplicate client entry based on the Client ID/Medicaid ID

SEARCH FOR A CLIENT

2. Enter values either in the **CLIENT ID**, **CLIENT FIRST NAME** or **CLIENT LAST NAME** field, or a combination of the three (3).
3. Click **SEARCH**. Any matching results are displayed at the bottom of the screen.



If multiple search values are entered, Sandata EVV attempts to match against all exact values entered.
Searching with no criteria selected displays a complete list of all active clients.

CREATE NEW CLIENT(S)

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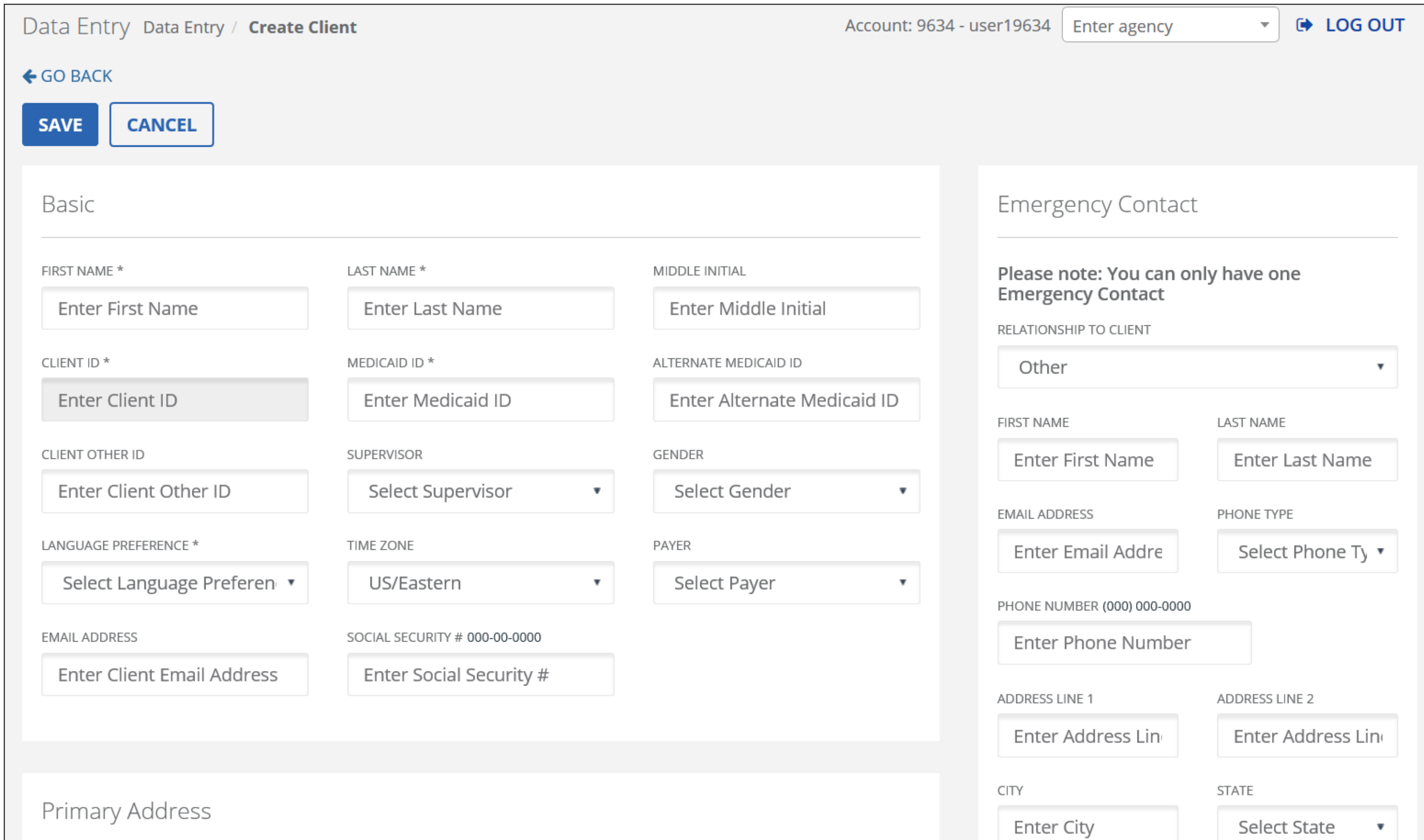
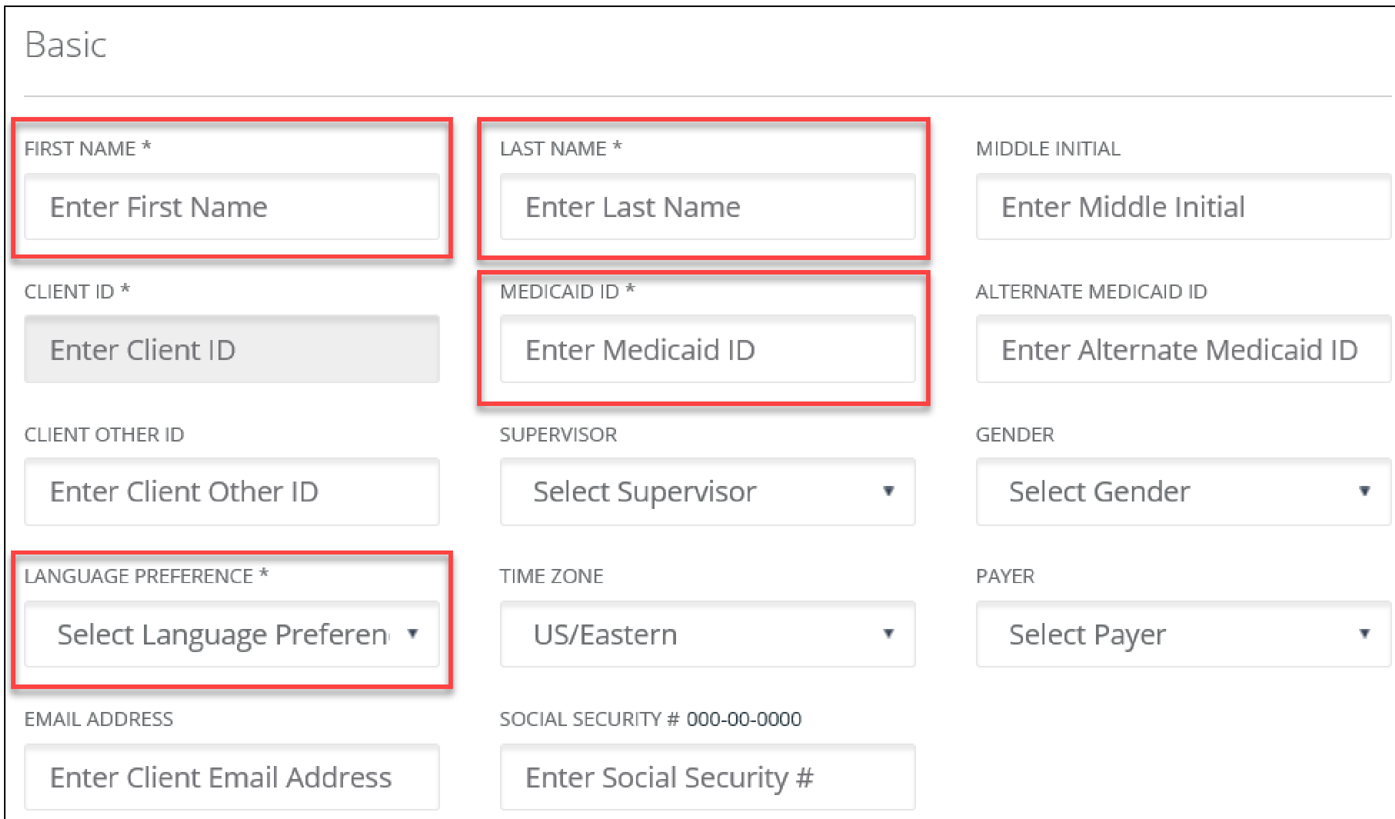
1. Click **CREATE CLIENT**. The *Create Client* screen opens.



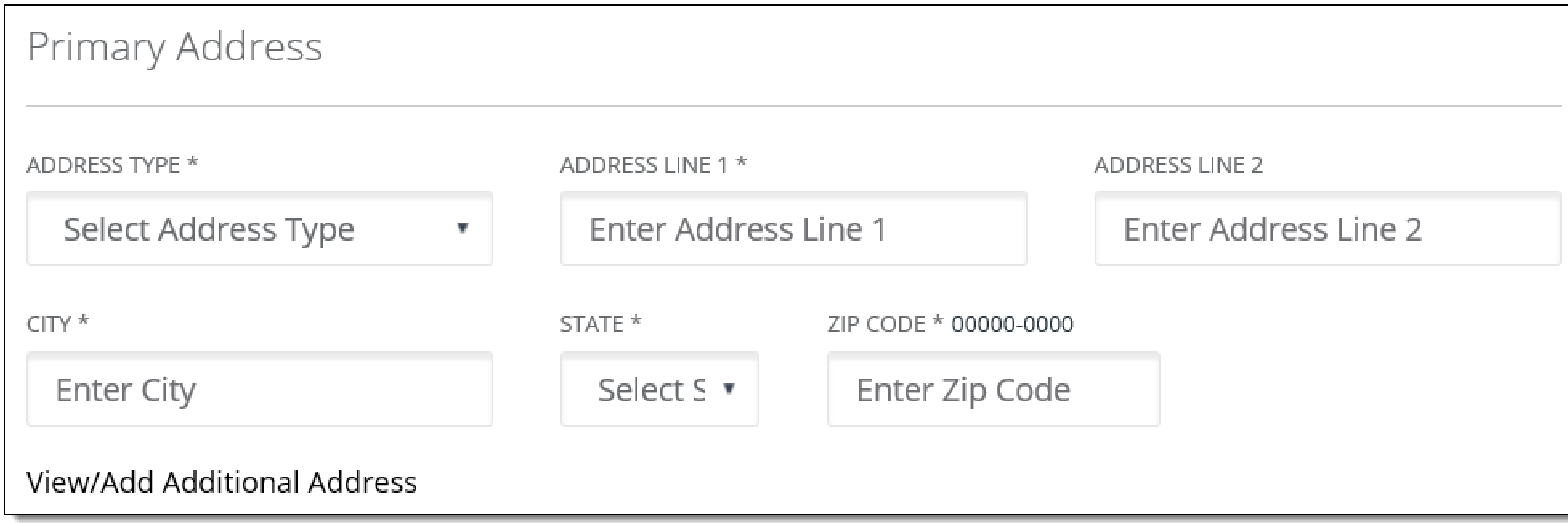
CREATE NEW CLIENT(S)

2. Enter **FIRST NAME**, **LAST NAME**, **MEDICAID ID** and **LANGUAGE PREFERENCE** (Required).



CREATE NEW CLIENT(S)

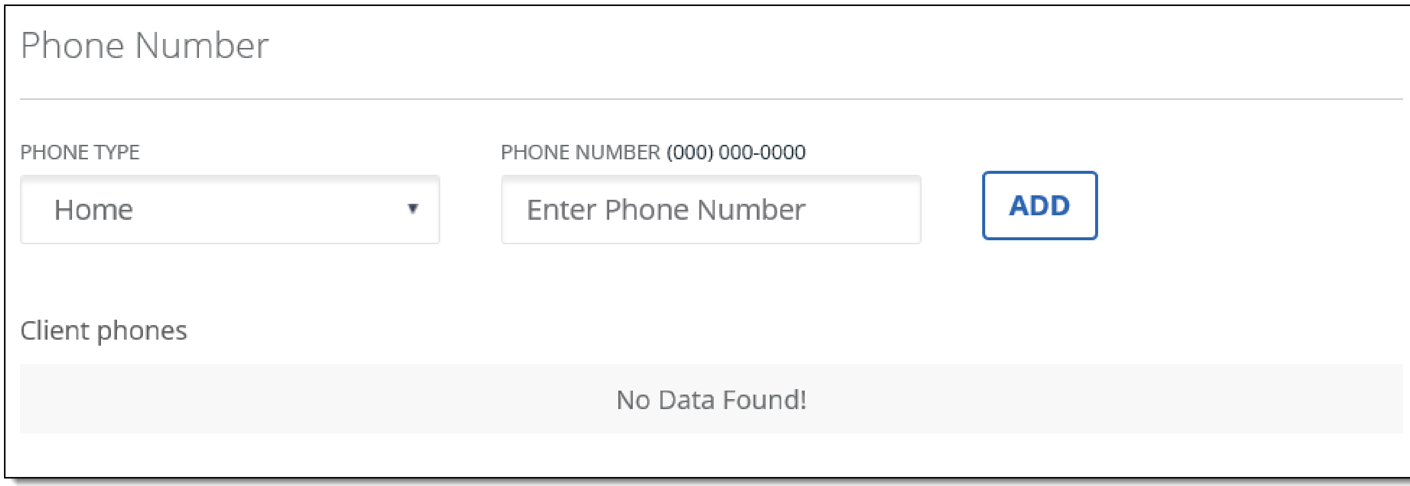
3. Enter client's Primary Address (Required).



If a client has more than one address where he or she can receive care, click the View/Add Additional Addresses link to add the additional address(s) to the record. This allows the system to validate call-in and call-out times against the additional addresses to aid in minimizing visit exceptions.

CREATE NEW CLIENT(S)

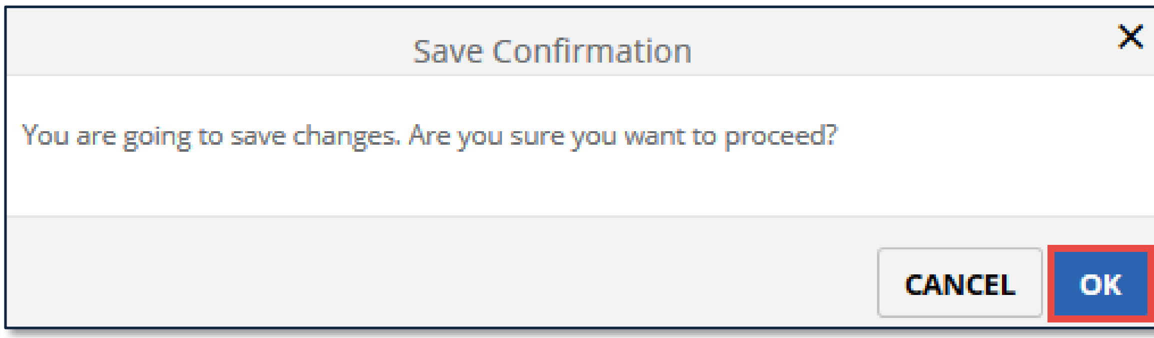
4. Select **PHONE TYPE**. Enter client's **PHONE NUMBER** (Optional).
5. Click **ADD**.

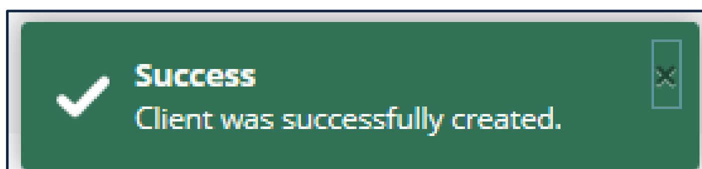


If a phone type is selected, a phone number **must** be added.
If a client has more than one phone number from which the provider can call, the additional phone number(s) should be added to the client record. Sandata EVV validates call-in and call-out times against all phone numbers listed in the client record, minimizing visit exceptions.

CREATE NEW CLIENT(S)

6. Click **SAVE**. The Save Confirmation dialog box displays.
7. Click **OK**. The Client is added to the system.





MODIFY/DELETE/REACTIVATE CLIENTS

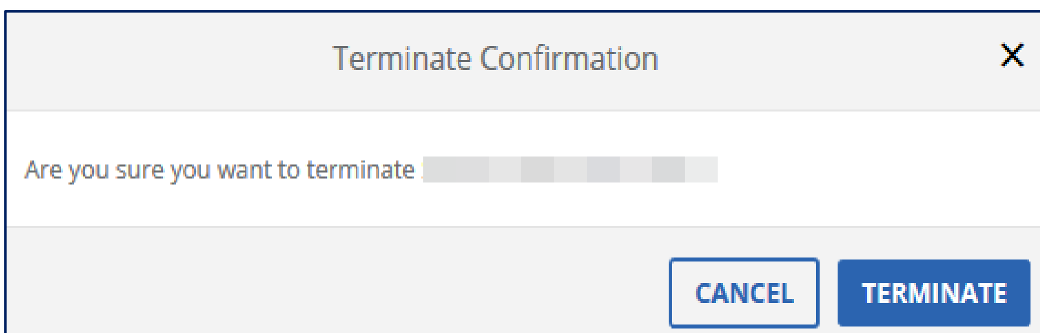
MODIFYING CLIENT DATA

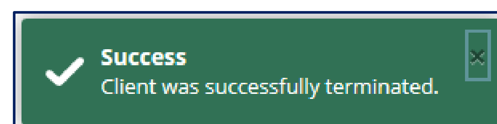
- Modifying a client's data allows updates to the information, as necessary.
- Any updates made for the client is effective from the time the change is made. The information previously available continues to be in effect for all calls and visits prior to the change. In other words, changes are not retroactive.

Last Name	First Name	Client ID	Client Medicaid ID	Status	Actions
[illegible]	[illegible]	[illegible]	[illegible]	Active	

DELETING CLIENTS

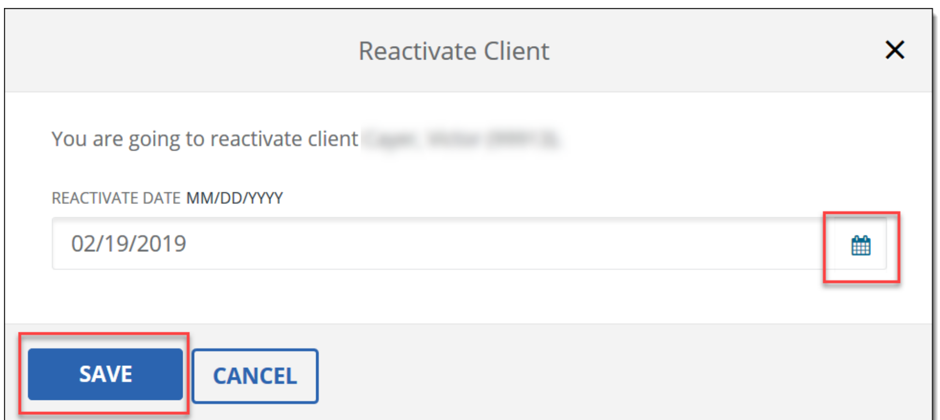
1. Search for the client.
2. Click Terminate ( ) to the right of the selected client’s name. The Terminate Confirmation dialog box displays.
3. Click TERMINATE. A successful confirmation displays.

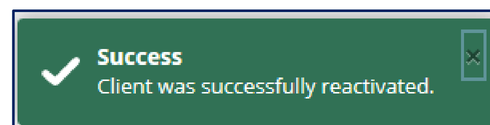




REACTIVATING CLIENTS

1. Search for a client with the status of Inactive.
2. Click Reactivate to the right of the selected client's name. The Reactivate Client confirmation dialog box displays.
3. Select a **REACTIVATE DATE**. The date defaults to the current day's date. A client can be reactivated up to the date they were originally deleted.
4. Click **SAVE**. A successful confirmation dialog box displays.





Sandata TECHNOLOGIES

QUESTIONS…